8. Enter and Issue Requests for Quote

8.1	**Introduction**	This procedure describes how to create and issue system generated SF-18 Requests for Quote (RFQ). The RFQ data is entered via the CSPS "Request for Quotation Screen" (PR605).
8.2	**Who Performs the Procedure**	Buyers will be responsible for entering and issuing RFQs.
8.3	**Initiating the Process**	Creating an RFQ begins when a buyer intends to solicit, in a written format, information from various vendors pertaining to price, product specifications, delivery schedules, etc.
8.4	**Accessing the System**	From the Main menu, select Transaction. From the Transaction menu, select Procurement. From the Procurement menu, select "PR602 - Buyer Initial Workload". Highlight the document line items to be assigned to an RFQ and select the "Assign to RFQ" button. The system will open the "Request for Quotation" (PR605) screen. Follow the steps below for PR605.

8.5	**Creating an RFQ**	This procedure describes the steps necessary to create an RFQ.

STEP	ACTION
PR602 - Buyer Initial Workload Management Screen	
1.	Double click on the line item(s) to be included on the RFQ. The line item should highlight yellow.
2.	Click on the **ASSIGN TO RFQ** button.
3.	PR605 screen appears.

PR605 - Request For Quotation

STEP	ACTION
PR605 - Request for Quotations Screen	

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

STEP	ACTION
4.	In the **THIS RFQ IS A SMALL BUSINESS SET-ASIDE** field, click on the field or press the space bar to insert a check and indicate that this award is a small business set-aside. If the award is not a small business set-aside, leave this field blank and document the file if required. In the **8(A) SET-ASIDE** field, click on the field or press the space bar to insert a check and indicate that this award is a 8(a) set-aside. If the award is not an 8(a) set-aside, leave this field blank and document the file if required.
5.	In the **EDI** field, click on the field or press the space bar to insert a check and indicate that this RFQ will be issued via EDI. If the RFQ is to be issued manually (ie printed out and mailed/provided to vendors), leave this field blank.
6.	In the **FOB DESTINATION** field, click on the field or press the space bar to insert a check and indicate if the vendor's shipping terms are to be "freight on board delivery". If the terms are not FOB origin, leave this field blank.
7.	In the **CLOSING DATE** field, review the system generated default closing date. The system calculates the closing date to be the tenth calendar day following the date the RFQ is created. The date can be overridden for a shorter or longer period. Note: The system will not allow vendor responses to be flagged for award prior to the closing date.
8.	Click the "Header" icon in the toolbar to enter a note. If the RFQ is issued via EDI, the note will be accessible to prospective vendors. If the RFQ is issued manually, the note will not print on the SF-18 and therefore will not be accessible to vendors.
9.	Click the "MORE" pushbutton to view the receiving office (i.e., ship-to location) for each line item. Note: The SF-18 only displays the first ship-to location for line items that indicate more than one receiving office. Additional addresses will need to be inserted directly into the description.
10.	In the **SUPPLIES/SERVICES** field, double click on the field to view the entire description. For each line item on the RFQ, modify the requisitioner's description if clarification is needed.
11.	In the **PSC** field, double click on the field to access a list of product service codes. For each line item on the RFQ, select the relevant product service code.

STEP	ACTION
12.	If the RFQ is not ready to be issued, click the "Exit" door and then click 'Yes' to save changes. The Buyer Workload Screen will appear and the RFQ number will appear next to each applicable requisition line item. If the RFQ is ready to be issued, see the procedures for "Section 8.9 - Issuing an RFQ".

8.6 **Updating an RFQ** This procedure describes the steps necessary to update an RFQ that has been created, but not issued. The "update" procedure is primarily used to access/modify an unissued RFQ. It can also be used to add one or more requisition line items from the "Buyer Initial Workload Management Screen" (PR602) to an unissued RFQ.

In general, a requisition line item on the Buyer Workload screen will only be added to an unissued RFQ when one or more line items from the RFQ's requisition have been omitted when the RFQ was created.

STEP	ACTION
PR602 - Buyer Initial Workload Management Screen	
1.	If no requisition line items are to be added to the RFQ, then proceed directly to Step 2. Otherwise, to add one or more requisition line items to an unissued RFQ, go to the Buyer Initial Workload Management Screen (PR602). Double click on the line item(s) to be added to an unissued RFQ. The line item(s) should turn yellow.
2.	Click on a single requisition line item that is already associated with the RFQ. The line item should turn blue.
3.	Click the "Update" icon on the toolbar (i.e., the "single page") to open the Request for Quotation (PR605) screen.
PR605 - Request for Quotations Screen	
4.	Once the RFQ is displayed, the buyer can modify the RFQ data or return a line item, cancel the RFQ, or even issue the RFQ. If line items have been added, then these requisition line item(s) should appear in the line item section.

8.7   **Returning a**   This procedure describes the steps necessary to remove a
            Line Item to the line item from an <u>unissued</u> RFQ and return it to the Buyer
            Workload   Initial Workload Management Screen (PR602).
            Screen

                            In general, this procedure will only be used when one or
                            more line items from one requisition have been
                            inadvertently included on an RFQ with line items from
                            another requisition.

STEP	ACTION
PR602 - Buyer Initial Workload Management Screen	
1.	On PR602, locate the RFQ on which a line item is to be returned.
2.	Click on the "Update" icon (i.e., the "single page") in the toolbar.
3.	PR605 appears.
PR605 - Request for Quotation Screen	
4.	On the Request for Quotation (PR605) screen, highlight the line item to be returned to the Buyer Workload screen by clicking on any of the line item's fields.
5.	Click the "Return" icon in the toolbar (i.e., the "red arrow") to return the line item. A message confirming the return will appear on the screen. Click 'Yes' to confirm the return or click 'No' to cancel the return.
6.	Click the "Exit" icon on the toolbar and enter 'Yes' to save changes when prompted. The "returned" line item should appear on the Buyer Workload screen.

8.8   **Canceling an RFQ**   This procedure describes the steps necessary to cancel an <u>unissued</u> RFQ and return all of the requisition line items to the Buyer Initial Workload Management Screen (PR602).

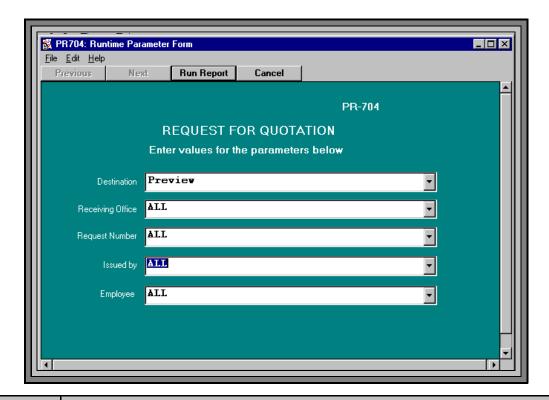| STEP	ACTION
PR602 - Buyer Initial Workload Management Screen	
1.	On PR602, locate the RFQ to be canceled.
2.	Click on the "Update" icon (i.e., the "single page") in the toolbar.
3.	PR605 appears.
PR605 - Request for Quotation Screen	
4.	On the Request for Quotation (PR605) screen, click the "Cancel" icon on the toolbar (i.e., "the eraser"). A message confirming the cancellation will appear on the screen. Click 'Yes' to confirm the cancellation or click 'No' to stop the cancellation. If you click 'Yes', the requisition line items should appear on the Buyer Initial Workload Management Screen (PR602).

8.9   **Issuing an RFQ**   This procedure describes the steps necessary to issue an RFQ.

STEP	ACTION
PR602 - Buyer Initial Workload Management Screen	
1.	On PR602, locate the RFQ to be canceled.
2.	Click on the "Update" icon (i.e., the "single page") in the toolbar.
3.	PR605 appears.
PR605 - Request for Quotation Screen	

STEP	ACTION
4.	On the Request for Quotation (PR605) screen, click the "Issue" icon in the toolbar (i.e., the "finger") to issue the RFQ. A message confirming the issue command will appear on the screen. Click 'Yes' to issue the RFQ or click 'No' to cancel the issue command. If you click 'Yes', the Buyer Initial Workload Management Screen will appear and the requisition/RFQ information will no longer appear on the screen.

8.10	**Printing (Running)**	This procedure describes the steps necessary to run the
	the SF-18 Request	"PR704 - SF18 Request for Quote".
	for Quote	

PR704 - Runtime Parameter Form (SF18 Quotes Received)

STEP	ACTION
1.	To run the "PR704 - SF18 Request For Quote", a. Click the "Printer" icon in the toolbar while the PR605 window is open and active, or b. From the Main Menu, select Reports. From the Reports menu, select Procurement. From the Procurement menu, select "PR704 - SF18 Request for Quote".
PR704: Runtime Parameter Form	

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

STEP	ACTION
2.	To select the destination of the report, click the pull down menu in the **DESTINATION** field and select the appropriate destination: a. To view the report on the screen, select "Screen". b. To send the report to a specific file, select "File". c. To send the report to the printer, select "Printer". d. To send the report to a mail file, select "Mail". e. To view the report on the screen, select "Preview". After selecting the destination, go to Step 3.
3.	To run a report for a specific receiving office, click the pull down menu in the **RECEIVING OFFICE** field and select the appropriate receiving office. Note: To run a report for all receiving offices, select "All".
4.	To run a report that contains a specific request for quotation number, click the pull down menu in the **REQUEST NUMBER** field and select the appropriate request for quotation number. Note: To run a report for all requests, select "All".
5.	To run a report that contains a specific contracting office which has issued the request, click the pull down menu in the **ISSUED BY** field and select the appropriate contracting office. Note: To run a report for all contracting offices, select "All".
6.	To run a report for a specific employee who created the request, click the pull down menu in the **EMPLOYEE** field and select the appropriate employee. Note: To run a report for all employees, select "All".
7.	Click the "RUN REPORT" pushbutton to execute the selection made. Proceed to Step 9.
8.	Click the "CANCEL" pushbutton to cancel the report selections made. Note: Upon clicking the "CANCEL" button the Runtime Parameter Form will close and exit the user to the last active screen.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

STEP	ACTION	
	IF...	**THEN...**
9.	The destination selected is "Screen" or "Preview"... and The "RUN REPORT" pushbutton is clicked...	a. To go to the next page of the report, click the "NEXT" pushbutton. b. To go to the previous page of the report, click the "PREV" pushbutton. c. To go to the last page of the report, click the "LAST" pushbutton. d. To go to the first page of the report, click the "FIRST" pushbutton. e. To go to a specific page of the report, enter the page number and then click the "PAGE" pushbutton. f. To print the report, click the "PRINT" pushbutton. g. To send the report to a mail file, click the "MAIL" pushbutton. This functionality is currently not available. h. To close the report, click the "CLOSE" pushbutton. i. To open a second report window, click the "NEW" pushbutton.